

ADDENDUM 3A

A. Required Veteran Services Entered in TrackOne

Step 1: Once logged in and customer is located, using the “Find Client” search, select the “Service” screen

TrackOne ClientTrack.Net - Microsoft Internet Explorer

Mary Urban - Indy WIA Help Topics About DSI Logout

Additional Participant Information

Home Address:
 Zip Code:
 City:
 State:
 County: -- SELECT --
 Home Phone:
 Work Phone:
 Msg Phone:
 Cell Phone:
 Email Address:
 Highest Grade Completed: -- SELECT --
 Highest Degree Attained: -- SELECT --
 Unemployment Insurance (UI) Status: -- SELECT --
 Citizenship: -- SELECT --

Org/Region Information-These values will be automatically assigned by the system

Created By Org ID:
 Organization Name:
 New Region Code:
 Old WSA Code:
 Date Created:

Previous Finish Pause Cancel

start | Inbox - Microsoft Out... | (0 unread) AT&T Yah... | https://www.trackone... | T1 Screen Shots.doc ... | 11:58 AM

Step 2: To add a VET service, click the “Add New” button. This will take you to the activity screen

TrackOne ClientTrack.Net - Microsoft Internet Explorer

Lidria Romero - Indy WIA Training Help Topics About DSI Logout

Activities

The client's activities/services are displayed below. The most recent items are listed first.
 To add a new activity, click the **Add New** button. To edit an existing activity, click the Action icon next to the desired record and select **Edit** from the menu.

9 records found.

Begin Date	Title	Funding Stream	Service Type	Line Code	Planned End Date	Actual End Date
1/30/2008	Work w/ client to develop job search plan	WIA-Adult	Employment Plan	N2	1/30/2008	
11/9/2007	1-on-1 Counseling and Career Planning	WIA-Adult	Counseling and Career Planning	N4	11/9/2007	11/9/2007
11/9/2007	Self-help - Assessment - Generic	Core Services	Informational/Self-Service	C9	11/9/2007	11/9/2007

Add New Cancel

start | Inbox - Microsoft Out... | (0 unread) AT&T Yah... | https://www.trackone... | T1 Screen Shots.doc ... | 11:58 AM

Step 3: At the “Add an Activity” page, click the magnifying glass next to Activity/Service Title, this will take you to available service by funding stream screen.

TrackOne
User Home Case Management
Add New Client Find Client
Szedenik, Princess
111-11-1111
12/25/1980
Case Management
Client Home Page
Reminders/Tasks
Edit Participant
Work History
Enrollment and Application
Services
Goals
Case Notes
Credentials
Test Results
Print ISS
TAA Forms
Administration
Administrative File Review
WIA Activities-Master
Activity
To add an activity, enter the following information.
Begin Date:* 02/01/2008
Activity/Service Title:*
Funding Stream:
Line Code:
Service Type:
Provider:
Training Provider ID:
O*Net Code:
O*Net Title:
Summary Description:
Status:* Active
Planned End Date:* 02/01/2008
Actual End Date:
Record Created By:
Service Notes-A notes field is provided for any justification, rationale or detailed information necessary for monitoring purposes. Please use accordingly. Notes in this field will be viewable by all users.
Service Notes:

Step 4: In “Category” select the appropriate category according to what services you provided the VET customer (Most of the time, it’s either “Core Service” or “Staff Assisted”).

TrackOne
User Home Case Management
Add New Client Find Client
Szedenik, Princess
111-11-1111
12/25/1980
Case Management
Client Home Page
Reminders/Tasks
Edit Participant
Work History
Enrollment and Application
Services
Goals
Case Notes
Credentials
Test Results
Print ISS
TAA Forms
Administration
Administrative File Review
WIA Activities-Master
Available Services By Funding Stream
Select the Funding Stream (only the ones for which this client is currently eligible are shown), and click Search to display a list of available services.
You can use the Category and Service Type selections to narrow the search. The Service Title box will match all titles containing the text in the box, for the selected Funding Stream.
Click on an item in the list to place the client into the selected service.
Funding Stream:* -- SELECT --
Category: -- SELECT --
Service Type: -- SELECT --
Service Title:
Search Cancel

Step 5: Click “Search.” A page displaying “Available services by funding stream” should show. Click on the appropriate Service Type. You will then be directed back to the “Activity” screen. **Note:** There are various services that may be selected for VET services (select most appropriate).

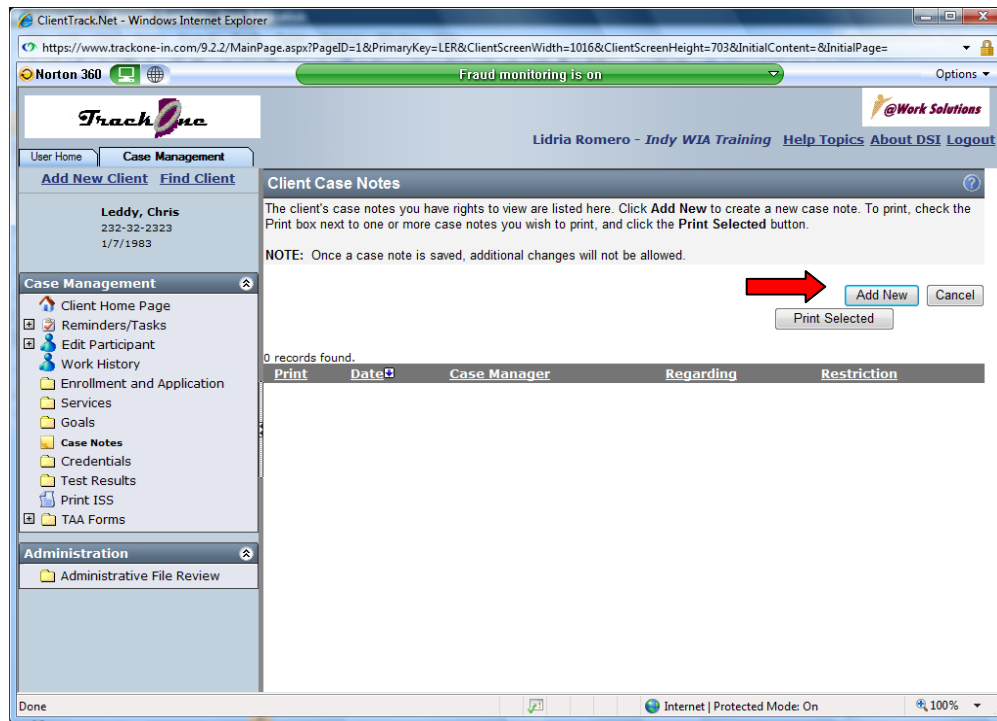
The screenshot shows the 'Available Services By Funding Stream' page in a Windows Internet Explorer browser. The page title is 'ClientTrack.NET Search - Windows Internet Explorer'. The address bar shows the URL: https://www.trackone-in.com/9.2.2/SearchPopup.aspx?FormID=100000199&MAP-ProviderID=100005092_DynamicFormRenderer1&ClientID=99732&MAP-ProgramName=100000. The Norton 360 status bar shows 'No fraud detected'. The page content includes instructions: 'Select the Funding Stream (only the ones for which this client is currently eligible are shown), and click Search to display a list of available services. You can use the Category and Service Type selections to narrow the search. The Service Title box will match all titles containing the text in the box, for the selected Funding Stream. Click on an item in the list to place the client into the selected service.' Below the instructions are search filters: 'Funding Stream: * -- SELECT --', 'Category: 2 Core - Staff-Assisted', 'Service Type: -- SELECT --', and 'Service Title:'. There are 'Search' and 'Cancel' buttons. Below the filters, it says '9 records found.' and displays a table of services.

Funding Stream	Service Type	Service Title	Line Code
WIA-Adult	Referral to Employment	Staff-assisted - Referral to Employment	CE
WIA-Adult	Staff Assisted Job Search	Staff-assisted - Job Search	CS
WIA-Adult	Staff Assisted Job Search	Workshop - Job Search	CS
WIA-Adult	Support Service Referral	Resource Directory Referral	CV
WIA-Adult	Other Core Services	Staff-Assisted - Assessment - Generic	C2
WIA-Adult	Other Core Services	Workshop - Career Interest or Assessment	C2
Core Services	Workforce Information Service	Staff-Assisted - Labor Market Information	C8
Core Services	Workforce Information Service	Workshop - Labor Market Information	C8
Core Services	Work Keys Referral	WorkKeys Referral	CK

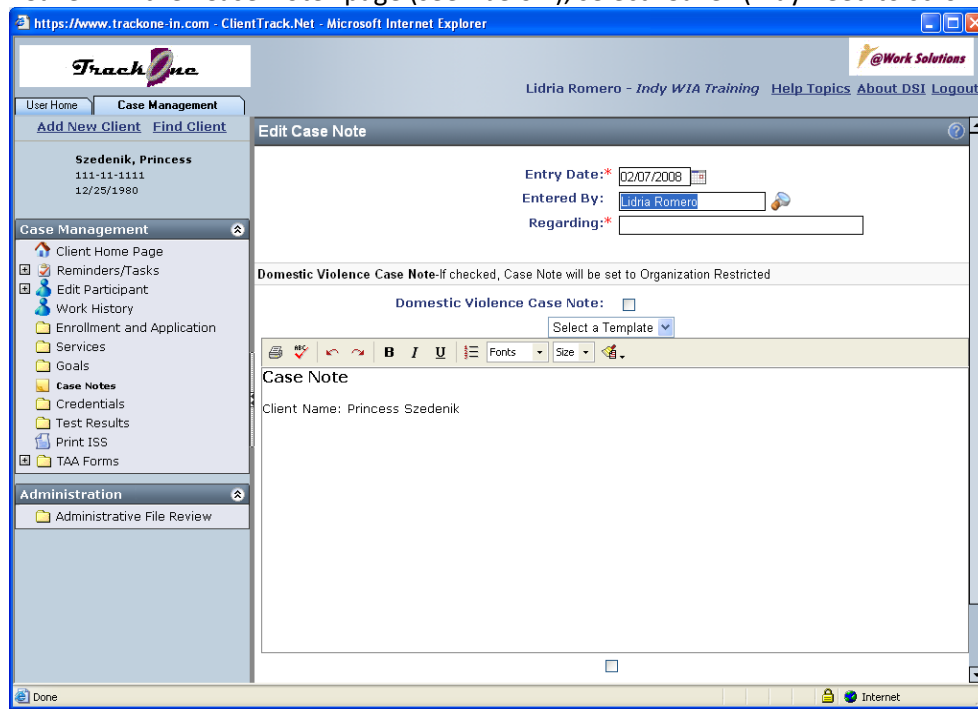
Step 6: Once back in “Activity” page, Select “Case Note” to describe the service provided

The screenshot shows the 'Activity' page in the ClientTrack.NET application. The page title is 'ClientTrack.NET - Windows Internet Explorer'. The address bar shows the URL: <https://www.trackone-in.com/9.2.2/MainPage.aspx?PageID=1&PrimaryKey=LER&ClientScreenWidth=1016&ClientScreenHeight=703&InitialContent=&InitialPage=>. The Norton 360 status bar shows 'Fraud monitoring is on'. The page content includes a sidebar with navigation links: 'User Home', 'Case Management', 'Add New Client', 'Find Client', 'Szednik, Princess', 'Case Management', 'Client Home Page', 'Reminders/Tasks', 'Edit Participant', 'Work History', 'Enrollment and Application', 'Services', 'Goals', 'Case Notes', 'Credentials', 'Test Results', 'Print ISS', 'TAA Forms', 'Administration', 'Administrative File Review'. A red arrow points to the 'Case Notes' link. The main content area is titled 'WIA Activities-Master' and 'Activity'. It contains a form to add an activity with the following fields: 'Begin Date: * 02/06/2008', 'Activity/Service Title: * Staff-assisted - Referral to Employment', 'Funding Stream: WIA-Adult', 'Line Code: CE', 'Service Type: Referral to Employment', 'Provider: Indiana WorkOne System', 'Training Provider ID:', 'O*Net Code:', 'O*Net Title:', 'Summary Description:', 'Status: * Active', 'Planned End Date: * 02/06/2008', 'Actual End Date:', and 'Record Created By:'. Below the form is a 'Service Notes' section with a text area for notes.

Step 7: Enter in Case Note: Describe the service being provided to the veteran (for example, working on a resume, preparing for an interview, or dealing with a VA or GI Bill question); and, describe details that show the depth of service being provided to the veteran (for example, jobs/employers to which resumes were mailed, details about the interview preparation activity, or suggestions for addressing the VA or GI Bill questions that were raised).



Step 8: After entering the case note in, ensure the spelling and grammar are correct before selecting "Save". In the "Case Note" page (seen below), select "Save" (may need to scroll down).



B. Service Strategy Development

Step 1: Enter a "Service"

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

User Home Case Management Mary Urban - Indy WIA Help Topics About DSI Logout

Add New Client Find Client

Bading, Frank
110-60-7845
5/10/1964

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Services
- Goals
- Case Notes
- Credentials
- Test Results
- Print ISS
- TAA Forms

Administration

- Administrative File Review

Additional Participant Information

Home Address:

Zip Code:

City:

State:

County: -- SELECT --

Home Phone:

Work Phone:

Msg Phone:

Cell Phone:

Email Address:

Highest Grade Completed: -- SELECT --

Highest Degree Attained: -- SELECT --

Unemployment Insurance (UI) Status: -- SELECT --

Citizenship: -- SELECT --

Org/Region Information-These values will be automatically assigned by the system

Created By Org ID:

Organization Name:

New Region Code:

Old WSA Code:

Date Created:

Previous Finish Pause Cancel

Step 2:

The "Activities" screen, displays the Customer's *Service Strategy* and/or *IEP*. All Services/Activities added should be displayed on this screen. In the "Activity" screen, click "Add New" to add an activity to the Customer's *Service Strategy* and /or *IEP*.

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

User Home Case Management Lidria Romero - Indy WIA Training Help Topics About DSI Logout

Add New Client Find Client

Szedenk, Princess
111-11-1111
12/25/1980

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Services
- Goals
- Case Notes
- Credentials
- Test Results
- Print ISS
- TAA Forms

Administration

- Administrative File Review

Activities

The client's activities/services are displayed below. The most recent items are listed first. To add a new activity, click the **Add New** button. To edit an existing activity, click the Action icon next to the desired record and select **Edit** from the menu.

3 records found.

Begin Date	Title	Funding Stream	Service Type	Line Code	Planned End Date	Actual End Date
1/30/2008	Work w/ client to develop job search plan	WIA-Adult	Employment Plan	N2	1/30/2008	
11/9/2007	1-on-1 Counseling and Career Planning	WIA-Adult	Counseling and Career Planning	N4	11/9/2007	11/9/2007
11/9/2007	Self-help - Assessment - Generic	Core Services	Informational/Self-Service	C9	11/9/2007	11/9/2007

Add New Cancel

Customer's Service Strategy. "Service Type" category will either list Service "Strategy/Name of Activity" or "IEP/Name of Activity"

Step 3:

At the “Add an Activity” page, click the magnifying glass next to Activity/Service Title, this will take you to available service by funding stream screen.

The screenshot shows the 'Add Activity' form in the TrackOne ClientTrack.Net application. The form is titled 'WIA Activities-Master' and 'Activity'. It contains several fields for adding a new activity:

- Begin Date:** 02/01/2008
- Activity/Service Title:** (Empty field with a magnifying glass icon next to it, indicated by a red arrow)
- Funding Stream:** (Empty field)
- Line Code:** (Empty field)
- Service Type:** (Empty field)
- Provider:** (Empty field)
- Training Provider ID:** (Empty field)
- O*Net Code:** (Empty field)
- O*Net Title:** (Empty field)
- Summary Description:** (Empty field)
- Status:** Active (Dropdown menu)
- Planned End Date:** 02/01/2008
- Actual End Date:** (Empty field)
- Record Created By:** (Empty field)

Below the form, there is a section for **Service Notes** with a text area for justification, rationale, or detailed information.

Step 4: In “Category”, select the appropriate “Category” and/or “service type” in the drop down menus.

The screenshot shows the 'Available Services By Funding Stream' search window in the TrackOne ClientTrack.Net application. The window is titled 'Available Services By Funding Stream' and contains the following fields:

- Funding Stream:** -- SELECT -- (Dropdown menu)
- Category:** -- SELECT -- (Dropdown menu)
- Service Type:** -- SELECT -- (Dropdown menu)
- Service Title:** (Empty text field)

There are 'Search' and 'Cancel' buttons at the bottom right of the window. The background shows the 'Add Activity' form from the previous screenshot.

Step 5: Click “Search.” A page displaying “Available services by funding stream” should show. Most times, either Category “3” or “6” is chosen. The page below displays the service types under “3 Intensive- Sign. Staff Assist.” Choose the best that applies by clicking on the service type.

Available Services By Funding Stream

Select the **Funding Stream** (only the ones for which this client is currently eligible are shown), and click **Search** to display a list of available services. You can use the **Category** and **Service Type** selections to narrow the search. The **Service Title** box will match all titles containing the text in the box, for the selected Funding Stream.

Click on an item in the list to place the client into the selected service.

Funding Stream: * -- SELECT --
 Category: 3 Intensive - Sign. Staff Assist
 Service Type: -- SELECT --
 Service Title:

16 records found.

Funding Stream	Service Type	Service Title	Line Code
WIA-Adult	Employment Plan	Work w/ client to develop job search plan	N2
WIA-Adult	Employment Plan	ISS/IEP Review & Update Session	N2
WIA-Adult	Employment Plan	Initial ISS/IEP Development Session	N2
WIA-Adult	Short Term Prevocational Training	Short-term Prevocational Training - Generic	N6
WIA-Adult	Short Term Prevocational Services	Short-term Prevocational Services - Generic	NP
WIA-Adult	Relocation Expenses	Relocation Expenses - Generic Item/ Vendor	NR
WIA-Adult	Internship/Cooperative Experience (Adult)	Internship/Cooperative Exp (Adult) - Generic	14
WIA-Adult	Work Experience (Adult)	Work Experience - Generic	01
WIA-Adult	Comprehensive Assessment	1-on-1 Counseling - In-depth assessment session	NA
WIA-Adult	Comprehensive Assessment	Group Counseling - Assessment results reviewed	NA
WIA-Adult	Comprehensive Assessment	1-on-1 Counseling - Assessment results reviewed	NA
WIA-Adult	Other Case Management Services	Budget Counseling for training	N1
WIA-Adult	Other Case Management Services	Budget Counseling - General	N1
WIA-Adult	Other Case Management Services	Work w/ client to customize LMI research	N1
WIA-Adult	Counseling and Career Planning	1-on-1 Counseling - Customer Crisis/Issue	N4
WIA-Adult	Counseling and Career Planning	1-on-1 Counseling and Career Planning	N4

Step 6: After selecting, TrackOne will revert to the “Activity” page. Some entries may be automatically filled in, but you must complete all other asterisked items. Click “save”

Activity

To add an activity, enter the following information.

Begin Date: * 02/01/2008
 Activity/Service Title:
 Funding Stream:
 Line Code:
 Service Type:
 Provider:
 Training Provider ID:
 O*Net Code:
 O*Net Title:
 Summary Description:
 Status: * Active
 Planned End Date: * 02/01/2008
 Actual End Date:
 Record Created By:

Service Notes: A notes field is provided for any justification, rationale or detailed information necessary for monitoring purposes. Please use accordingly. Notes in this field will be viewable by all users.

Service Notes:

Historical Data

O*Net Code (read-only):
 Client Intake Site:
 Provider Name:
 Case Mgr Name:
 Office Name:
 WSA:
 Total Hours:
 Total Obligated:
 Total Expended:
 Created Date:

Step 7: Case Note

After saving in the "Activity" page, go to "Case Notes" page to record

The screenshot shows the ClientTrack.Net interface. The left sidebar has a 'Case Management' section with a 'Case Notes' link highlighted by a red arrow. The main content area is titled 'Enrollment and Application' and displays a table of client enrollments.

Participation Date	Exit Date	App. Date	Interviewer	Organization	Region	Eligibility
11/9/2007		11/9/2007	Danielle Gyuriak	Goodwill - St. Joe	02	Adult

Step 8: Click "Add New" to add a new case note to the customer's Service Strategy

The screenshot shows the 'Client Case Notes' page. The left sidebar has a 'Case Notes' link highlighted. The main content area is titled 'Client Case Notes' and displays a table of client case notes. A red arrow points to the 'Add New' button.

Print	Date	Case Manager	Regarding	Restriction
<input type="checkbox"/>	2/7/2008	Lidia Romero	test	Unrestricted
<input type="checkbox"/>	2/5/2008	Lidia Romero	IEP Review & Update	Unrestricted
<input type="checkbox"/>	2/5/2008	Lidia Romero	Service Strategy- ONE on ONE Counseling	Unrestricted

Step 9:

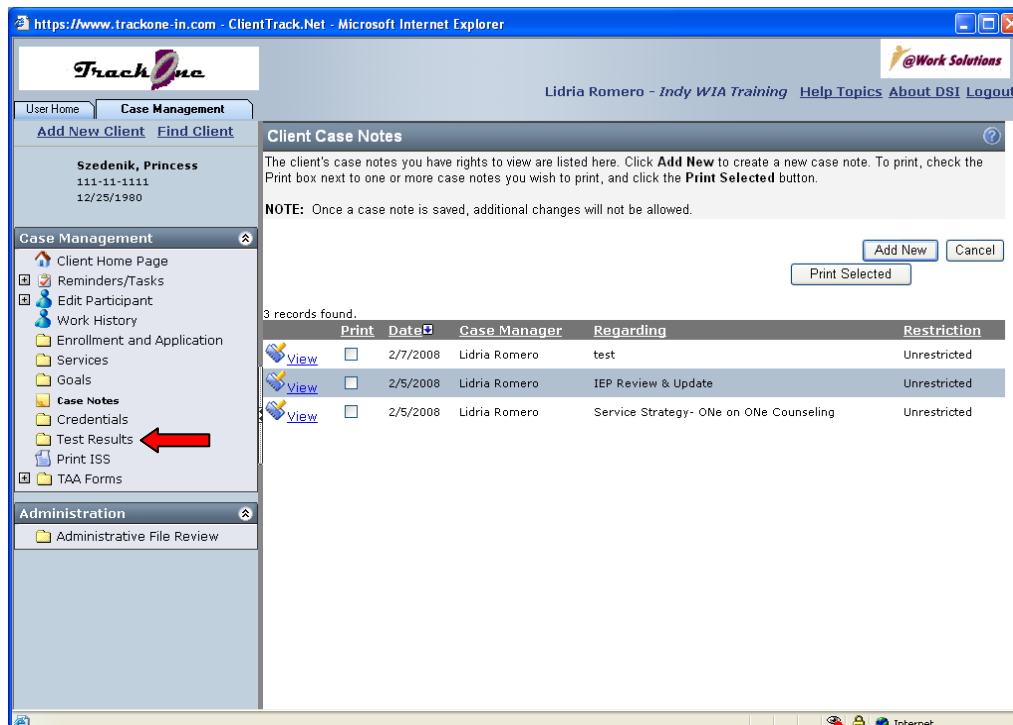
In the “Edit Case Note” screen, the “Entry Date” and “Entered by” will automatically be filled in by TrackOne. In the “Regarding” box, the case note entered should be titled: “Service Strategy/Name of the Activity.” Example: “Service Strategy/Staff Assisted Job Search”, “Service Strategy/TABE”, or “Service Strategy/ Scheduled for Product Activity.” Follow Skills Development Team Procedure Manual for Case Note material. Click “Save” when done.

The screenshot displays the 'Edit Case Note' screen in the TrackOne web application. The browser address bar shows 'https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer'. The user is logged in as 'Lidria Romero - Indy WIA Training'. The sidebar on the left contains navigation links under 'Case Management' and 'Administration'. The main content area shows the 'Edit Case Note' form for client 'Szedenik, Princess'. The form includes fields for 'Entry Date' (02/07/2008), 'Entered By' (Lidria Romero), and 'Regarding' (which is empty and highlighted with a red arrow). Below these fields is a 'Domestic Violence Case Note' checkbox and a 'Select a Template' dropdown. The 'Case Note' text area contains the text 'Client Name: Princess Szedenik'. At the bottom, a note states 'Note-Additional changes to this case note will not be possible after it is saved', and there are 'Save', 'Pause', and 'Cancel' buttons. A red arrow points to the 'Save' button.

C. Additional Assessment Activities

Follow **Steps 1-9 in Section "B"** to add an **"Activity"**. In Step 5, on the page displaying "Available services by funding stream" choose the correct "Service Type" and click "search." The page displaying the service types displays. Choose the best *Service Type* that applies.

Step 10: After clicking "save" in the "case note" page, and to record a TABE, WorkKeys, or CASAS Test, click on "Test Results."



Step 11: Click on "Add New"



Step 12:

In the “Test and Test Result” page, fill in all appropriate fields. Click “Save.”

The screenshot shows the ClientTrack.Net web application in Microsoft Internet Explorer. The browser address bar displays <https://www.trackone-in.com> - ClientTrack.Net. The application header includes the TrackOne logo, the user name "Lidria Romero - Indy WIA Training", and links for "Help Topics", "About DSI", and "Logout".

The left sidebar contains the following navigation sections:

- User Home**
 - Case Management
 - Add New Client
 - Find Client
- Case Management**
 - Client Home Page
 - Reminders/Tasks
 - Edit Participant
 - Work History
 - Enrollment and Application
 - Services
 - Goals
 - Case Notes
 - Credentials
 - Test Results**
 - Print ISS
 - TAA Forms
- Administration**
 - Administrative File Review

The main content area is titled "Indy WIA Test Results" and "Test and Test Results". It includes the following text:

Identify the test the client took along with the results of that test.

WIA Youth Literacy and Numeracy Gains Measures:
Test names marked with (Y) can be used to assess literacy and numeracy skills for the WIA Youth performance measures. Test names marked with (Y-ESL) can be used to assess English literacy skills for English as a Second Language (ESL) youth for the WIA performance measures.

For the performance measures, youth must be given a pre-assessment within 60 days of enrolling in WIA, and a post-assessment within one year, and once a year thereafter while they are participating in WIA.

The form fields are as follows:

- Test Name: * -- SELECT --
- Test Type: * -- SELECT --
- Date: *
- Score: *
- Grade Level: *
- Passing/Competent: ☐
- Description/Comments: *

A red arrow points to the "Save" button, which is located next to the "Description/Comments" field. Other buttons include "Pause" and "Cancel".

D. IEP

Follow Steps 1-7 in Section B. In Step 5, on the page displaying “Available services by funding stream” choose the correct “Service Type” and click “search.” The page displaying the service types is displayed. Choose the best *Service Type* that applies.

Step 8: Click “Add New” to add a new case note to the customer’s *IEP*

The screenshot shows the ClientTrack.Net web application in a Microsoft Internet Explorer browser window. The address bar displays 'https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer'. The page header includes the 'TrackOne' logo and the user name 'Lidria Romero - Indy WIA Training' with links for 'Help Topics', 'About DSI', and 'Logout'. The left sidebar contains navigation menus for 'Case Management' and 'Administration'. The 'Case Management' menu is expanded, showing options like 'Client Home Page', 'Reminders/Tasks', 'Edit Participant', 'Work History', 'Enrollment and Application', 'Services', 'Goals', 'Case Notes', 'Credentials', 'Test Results', 'Print ISS', and 'TAA Forms'. The 'Case Notes' option is highlighted. The main content area is titled 'Client Case Notes' and contains a message: 'The client's case notes you have rights to view are listed here. Click **Add New** to create a new case note. To print, check the Print box next to one or more case notes you wish to print, and click the **Print Selected** button.' Below this message is a 'NOTE: Once a case note is saved, additional changes will not be allowed.' and buttons for 'Add New', 'Cancel', and 'Print Selected'. A table displays 3 records found, with columns for 'Print', 'Date', 'Case Manager', 'Regarding', and 'Restriction'. The table contains three rows of case notes, each with a 'View' link and a 'Print' checkbox.

Print	Date	Case Manager	Regarding	Restriction
<input type="checkbox"/>	2/7/2008	Lidria Romero	test	Unrestricted
<input type="checkbox"/>	2/5/2008	Lidria Romero	IEP Review & Update	Unrestricted
<input type="checkbox"/>	2/5/2008	Lidria Romero	Service Strategy- ONe on ONe Counseling	Unrestricted

Step 9:

In the “Edit Case Note” screen, the “Entry Date” and “Entered by” will automatically be filled in by TrackOne. In the “Regarding” box, the case note entered should be titled: “IEP/Name of the Activity.” Example: “IEP/On-the-Job Training”, “IEP/Customized Training”, or “IEP/Occupational Training.” Follow procedure manual for Case Note material. Click “Save” when done.

E. Product Activities: Record in TrackOne

Follow **Steps 1-9** in Section “B” to add an “Activity” for a WorkOne Product Activity. In Step 5, on the page displaying “Available services by funding stream” choose the correct “Service Type” and click “search.” The page displaying the service types displays. Choose the best *Service Type* that applies.